

2020 AmeriCorps Program Contracting Instructions



California Volunteers (CV) requires that AmeriCorps programs have an executed contract in place prior to enrolling members and incurring costs against the federal (CNCS) share of the grant.

AmeriCorps grantees must follow the instructions included in this document to complete and submit the Program Readiness Flow and Contract Checklist Flow in the California AmeriCorps Community in Salesforce. These can be worked on simultaneously and are submitted independently. CV will not proceed with the review of either flow until it has been **submitted**. Please allow up to 30 days from the time that both have been **submitted** for the contract to be drafted and sent for signature.

Pre-contract Change Requests

Programmatic Changes due to COVID-19:

Whether or not you anticipate program changes due to COVID-19, **all programs must complete the [California Volunteers 2020-21 COVID-19 Program Plan](#)** as part of the program readiness process. *You may do this immediately* and let your Program Officer know once you've submitted it in forms.

This form documents your request to make programmatic changes related to the COVID-19 pandemic prior to contract execution. Program changes may include, for example, transitioning to virtual training for members or a change in service activities. After review, your PO will let you know if any updates are needed to your Performance Measure Worksheets, Program Diagram, etc. All changes must be formally requested and approved by your Program Officer before they can be applied to your contract.

Budget Changes:

Any changes to the budget must be requested using the [Pre-Contract Budget Change Request](#) form and must use the awarded budget in eGrants as the starting point. Submit the form to Catherine.McGuire@cv.ca.gov and copy your Program Officer. All changes must be formally requested and approved by the CV fiscal team. Any changes not approved will not go into effect pre-contract.

Accessing your Program in the California AmeriCorps Community in Salesforce

Like last year, we will use the [California Volunteers AmeriCorps Community in Salesforce](#) to facilitate the contracting process. Please follow the steps below to begin:

1. Log in to the Salesforce community using the link above*.
2. Click on your program for the 2020-21 program year.
3. Begin the *Program Readiness Flow* and the *Contract Checklist Flow*. You are able to work on both flows concurrently. Both sections will be processed simultaneously by CV staff, but the contract cannot be executed until Program Readiness has been approved by your Program Officer.
4. Once both you've completed a Flow, click Submit to alert CV that your documents are ready for review.
5. Please allow up to 30 days after your submission for CV to prepare a contract.

*New programs and new users will need to complete the AmeriCorps Community Salesforce User Form and send to Patrick.Gianelli@cv.ca.gov to gain access to the system. The User Form and the User Guide for the system can be found in the Salesforce Community section on the [contracting page](#).

Completing the Program Readiness Flow

These items help assess readiness to operate your AmeriCorps program.

Access the Flow: From the Program record, click on the button labeled “Program Readiness Flow” at the top of the page. Once the page loads, upload the completed Program Readiness Checklist and its associated documents. You can save your progress and return later by clicking “Save” at the bottom or each step.

There is one checklist/flow for New Programs and a shorter one for Continuing and Recompeting Programs.

[Program Readiness Checklist – Continuing/Recompeting Programs \(year 2+\)](#)

1. Program Readiness Checklist
2. Member Service Agreement
3. Member Enrollment Training Completion & Quiz
4. CV NSCHC Training Completion & Quiz
5. CNCS NSCHC eCourse Certificate

[Program Readiness Checklist – New Programs \(year 1\)](#)

1. Program Readiness Checklist
2. Member Service Agreement
3. AmeriCorps Member Application
4. Member Position Description
5. Staff CV NSCHC Verification Form (COVID version)
6. Current CNCS eCourse Certificate for at least one staff person
7. *CV NSCHC Using Truescreen & Fieldprint* - Training completed & Quiz submitted for at least one staff person
8. National Service Criminal History Checks (NSCHC) Policy and Procedure
9. AmeriCorps Member Service Opportunities posted on the My AmeriCorps Portal
10. *Member Enrollment in eGrants* - Training Completion & Quiz submitted
11. AmeriCorps Member Timesheet template
12. Staff Timesheet Template
13. Training Attestation
14. Member Performance Evaluation templates

Once you have uploaded all documents (or provided a Note in the Subgrantee Notes field on the status of any document not uploaded), click **Submit** at the bottom of the page to notify your Program Officer that the documents are ready for review. Your Program Officer will review and work with you to finalize these documents before contract execution.

Completing the Contract Checklist Flow

These items are the same for all programs and relate to organizational fitness for managing the grant.

Access the Flow: From the Program record, click on the button labeled “Contract Checklist Flow” at the top of the page. You can save your progress and return later by clicking “Save” at the bottom or each step.

Step 1: Instructions – the Salesforce instructions are relevant, but this document takes precedence if there are any contradictory guidance between this document and the Contract Checklist Flow.

Step 2: Program Dates – enter the dates requested.

Step 3: Program Description – enter a narrative description of your program, member activities, and member qualifications for your program. This should reflect your awarded program design.

Step 4: Labor Organization Certification – select the option that applies for your program. Supporting documentation that meets the requirements in the selected option must be provided in Step 7.

Step 5: Tutoring Program Compliance Certification – if your AmeriCorps members will not serve as tutors, select ‘Not Applicable’. Otherwise, you must certify compliance with both requirements.

Step 6: Confirmed Match Assurance – enter the sources of all matching funds identified in the budget. Although there is a CNCS Match Waiver in place, the Salesforce system requires the total to exactly match the budgeted Grantee Share. Per the waiver, you will not be held to the match included in this process.

Step 7: Documents – upload all documents listed below. If a document is listed but is not applicable for your organization, provide a note in the “Sub-grantee Notes” field.

Contracting Flow Document List: (templates & forms can be found on the [here](#))

Programmatic Documents

- Labor Organization Certification Supporting Document
- CV NSCHC Policy Agreement

Financial Documents

- Payee Data Record Form Std. 204 (required of all non-state entities)
- Invoice Submittal Process Description (required)
- Evidence of Liability Insurance Coverage (required, must show unexpired coverage)
- Address List for Board of Directors (not required for state & local government entities)
- Signed Council/Board Resolution/Certified Minutes Accepting Fiduciary Responsibility
- Audited Financial Statements
- Schedule of Federal Expenditures
- Single Audit (if Federal Expenditures exceeds \$750,000 in a single year)

Step 8: Contract Checklist Submission – check the box to certify your contract submission and **click Submit**. This step will not validate unless a document is uploaded or a note is present for each item.

All previous steps must be completed before your Contract Checklist will submit.

Contract Execution Process

Once all reviews have been completed and approved:

1. California Volunteers will draft the contract.
2. The contract and exhibits will be sent by email for review and signature by the Legal Applicant Representative.
3. Print two copies of the Standard 213 Agreement and one copy of the CCC-307 that you receive with your contract. Have all 3 signed with a *wet signature* by the Legal Applicant Representative. Return by post to California Volunteers.
4. Once received, California Volunteers will countersign, at which point the contract will be officially executed.
5. A photocopied version of the fully executed STD 213 will be sent via email, and the original will be mailed for your records. The **date of execution** (step 4) **will be the first date that expenses can be incurred against the grant – including member service hours.**

CV Review of Your Contract: Criteria Needed

Once the Contract Checklist Flow has been submitted, California Volunteers begins their review of your contract.

This includes:

- Review of your program dates – *Are they reasonable? Are they realistic?*
- Review of Programmatic Documents
 - Labor Organization Certification Support Document – *Does the document provided meet the requirements for the option selected in Step 4?*
 - CV NSCHC Policy Agreement – *Is this document signed and dated?*
- Financial Documents
 - Payee Data Record Form Std. 204 - *Is the form completed, or is this form not required for the organization?*
 - Invoice Submittal Process Description - *Are the staff responsible identified? Is the method of invoicing clear?*
 - Evidence of Liability Insurance Coverage - *Is the coverage current? Will it be current into the program year?*
 - Address List for Board of Directors - *Is an address list provided? Or was an explanation for why this is not applicable received?*
 - Governing Body Acceptance of Fiduciary Responsibility - *Does the board resolution/certified minutes include the specific grant?*
 - Audited Financial Statements - *Does the audit cover the most recent fiscal year?*
 - Schedule of Federal Expenditures - *Are federal expenditures for the two most recent completed fiscal years included?*
 - Single Audit (if Federal Expenditures exceeds \$750,000 in a single year) - *Did the Schedule of Federal Expenditures indicate more than \$750,000 of federal dollars were received? Does the Audit include an auditor's report in compliance with the Uniform Administrative Guidance?*
- Program Officer approval of all Program Readiness items
 - Does each item support what was described in the grant application?
 - Does each contain all criteria included on the checklist?